

California Department of Tax and Fee Administration

DUTY STATEMENT

☐ CURRENT
☒ PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION Business Taxes Specialist II		WORKING TITLE Technical Advisor for the Operations Administrator	
DIVISION/OFFICE/UNIT Field Operations Division/Administration		SPECIFIC LOCATION ASSIGNED TO Sacramento, CA	
SEERA DESIGNATION Rank and File	BARGAINING UNIT 01	WORK WEEK GROUP 2	CERTIFICATES REQUIRED None
FINGERPRINTS/BACKGROUND CHECK REQUIRED <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	BILINGUAL POSITION <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	SUPERVISION EXERCISED May act as lead	
INCUMBENT		POSITION NUMBER (Agency-Unit-Class-Serial) 291-440-4379-002	
<p><i>The mission of the California Department of Tax and Fee Administration is to make life better for Californians by fairly and efficiently collecting the revenue that supports our essential public services.</i></p>			
<p>POSITIONS ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS</p> <p>Under the direction of the Business Taxes Administrator (BTA) III, Operations Administrator, the Business Taxes Specialist (BTS) II, Technical Advisor serves as a technical and strategic advisor and supports and provides guidance to the Operations Administrator and the Field Operations Division (FOD) Team on administrative issues related to the operations of field offices. The Technical Advisor leads and directs high-impact projects and activities, drives operational improvements, and helps shape strategies to ensure the division operates at peak efficiency. The incumbent takes ownership of strategic initiatives and assists in the development and implementation of strategies for effective and efficient administration of the program. The technical advisor develops, reviews, and evaluates data, program effectiveness, and operational efficiency to make recommendations on policies and procedures. Travel may be required up to twenty percent (20%) of the time.</p> <p>Candidate must be able to perform the following essential job functions with or without reasonable accommodation.</p>			
PERCENTAGE OF TIME SPENT	DUTIES		
30%	<p><u>ESSENTIAL JOB FUNCTIONS</u></p> <p>Acts independently or as part of a project team to research complex administrative issues as requested by the Operations Administrator, Assistant Deputy Directors of FOD, Deputy Director of FOD, and CDTFA Director, providing recommendations and solutions to drive operational excellence. Prepares or coordinates the development of reports on a variety of technical subjects, analyzes the information, and conveys the results to management. Provides advice and assistance to Senior Management and Field Offices on administrative and operational matters. Serves as a resource for FOD, answering questions, clarifying direction, and ensuring alignment. Facilitates the preparation of draft correspondence for the Operations Administrator, Senior Staff, and Executive Management as required.</p>		
30%	<p>Acts as lead to the Operations team, analyzes and makes recommendations on matters related to organizational changes, budgeting, workload determinations, and staffing requirements, training and coaching, personnel matters (including transfers and promotions), facility issues, and other matters related to the management of field operations. Identifies gaps, inefficiencies, and risks and proposes actionable recommendations on policies and procedures to improve program effectiveness and operational efficiency, assists in developing and implementing strategies for effective and efficient administration of the Sales and Use Tax Program. Assesses program efficiencies, research solutions, and coordinates with units to deliver process improvements.</p>		

30%	Provides advice and consultation in formulating statewide operating and administrative policies and procedures for FOD. Leads analysis of field office activities to ensure compliance and provides guidance and assistance to the field offices on operational and administrative matters. Assists Administrators and serves as liaison for the field offices with headquarters units to facilitate resolution of administrative problems. Establishes and maintains relationships with other Departmental units and meets regularly to address and find solutions to matters related to field operations. Plans, coordinates, and timely executes all aspects of special projects, events, and activities within FOD and CDTFA. Tracks progress on division-wide initiatives and ensure deadlines and deliverables are met.
5%	<u>MARGINAL JOB FUNCTIONS</u> Coordinates team member activity with respect to interagency projects, assists and/or represents the Operations Administrator on committees or joint efforts with multi-governmental agencies.
5%	Performs other duties of a highly technical and sensitive nature, as required.

WORK ENVIRONMENT OR PHYSICAL ABILITIES REQUIRED FOR THE JOB (if applicable):

Work Environment:

- ☒ May work in a high-rise building
- ☒ Standard office environment
- ☒ Fast-paced environment

Physical Abilities:

- ☒ Ability to transfer and transport materials, supplies, and equipment weighing up to thirty (30) pounds with or without reasonable accommodation.
- ☒ Use a computer/laptop, office equipment, and telephone daily.

Additional Requirements/Expectations:

- ☒ Lead role
- ☒ Fast paced and self-driven
- ☒ Resourceful and solutions-focused
- ☒ Detail-oriented and organized

I have read this duty statement and fully understand that I must perform the Essential Job Functions of my position with or without reasonable accommodation.

PRINT EMPLOYEE NAME	EMPLOYEE'S SIGNATURE	DATE
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I certify that the above accurately represents the position's duties and that I have reviewed these duties with the above-named employee.

PRINT SUPERVISOR NAME	SUPERVISOR'S SIGNATURE	DATE
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HRB Approval Date: 10/3/25	C&P Analyst Initials: LS
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